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## Netherlands

## Livestock and Products

## The Benelux Beef Market

## 2007

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**Report Highlights:**

This report describes marketing opportunities for U.S. beef in the Benelux region. FAS/The Hague estimates that U.S. beef could further penetrate the Benelux market, elevating the annual import volume from 300 MT to more than 3,000 MT. For more detailed information and recommendations by market segment, interested persons should contact our office.

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## Executive Summary

This report describes marketing opportunities for U.S. beef in the Benelux region. FAS/The Hague estimates that U.S. beef could further penetrate the Benelux market, elevating the annual import volume from 300 MT to more than 3,000 MT. For more information on estimates of additional U.S. beef tonnage by market segment, conclusions and recommendations for U.S. beef exporters, please contact FAS/The Hague.

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The European Union (EU) is the biggest beef and veal market in the world after the United States, with a total domestic consumption of 8.2 million MT in 2006. Since 2003, the EU has been a net importer of beef. The European Commission forecasts that EU beef and veal imports will rise continuously to about 730,000 MT in 2012. For many years, U.S. beef exports to this market have been constrained by the EU ban on imports of red meat from animals treated with growth hormones. U.S. non-hormone beef must come from cattle certified under the Non-Hormone Treated Cattle (NHTC) program in order to be eligible for export to the EU. The limited number of U.S. slaughter plants with EU approval also has had a negative impact on trade. The current level of non-hormone U.S. beef exports to the EU is very small but U.S. producers and exporters have expressed interest in boosting this volume to gain a larger share of the European market.

With a demand of 525,000 MT of beef, the Benelux region is the sixth largest beef market in the EU. Based on its geographical location and excellent infrastructure, the Benelux often serves as an entry point for EU imports from third countries. U.S. beef could further penetrate the Benelux market, elevating the annual import volume from the current level of 300 MT to about 3,400 MT. The projected level of 3,400 MT of import demand for U.S. beef is only one percent of the Benelux beef market. Considering the price sensitivity of the Benelux consumer, it may be that some other EU member state markets would show an even greater response to improved access to U.S. beef. With a coordinated marketing effort across a number of EU member states, the United States should be able to significantly increase beef exports to the broader EU market.

## I. The EU Beef Market

### The EU Beef Market In Perspective

Table I. EU-25 Beef & Veal PSD 1,000 MT (Carcass Weight)						
	2002	2003	2004	2005	2006	2007
Production	8,145	8,061	8,007	7,770	7,880	7,880
Imports	461	463	584	599	540	560
Exports	485	388	358	255	200	200
Consumption*	8,187	8,315	8,292	8,114	8,220	8,240

Source: USDA / FAS

Consumption includes commercial stock building.

With a total domestic consumption of 8.2 million MT in 2006, the EU is the biggest beef and veal market in the world after the United States. In product weight<sup>1</sup>, the market size for beef and veal is estimated at about 6.0 million MT. Since 2003, the EU has been a net importer of beef. In 2006, beef imports declined temporarily due to restrictions on the

<sup>1</sup> Based on a conversion factor of 1.36

supply from Brazil and Argentina. EU beef import volume is anticipated to recover in 2007 and increase further in the following years (see GAIN Report E47008). The European Commission forecasts that EU beef and veal imports will rise continuously to about 730,000 MT in 2012.

## EU Beef Imports

Table II. EU-25 Beef Imports 1,000 MT (Product Weight)							
	Origin	Quota	2003	2004	2005	2006	2007
<b>Quotas</b>	<b>Total</b>	<b>238.6</b>	<b>158</b>	<b>169</b>	<b>170</b>	<b>163</b>	<b>165</b>
<b>Quotas Fresh</b>	<b>Total</b>	<b>82.8</b>	<b>48</b>	<b>48</b>	<b>49</b>	<b>50</b>	<b>52</b>
Fresh Hilton	Argentina	28.0	28	28	28	28	28
	Australia	7.2	7	7	7	7	7
	Brazil	5.0	5	5	5	5	5
	Uruguay	6.3	6	6	6	6	6
	New Zealand	1.3	<1	<1	1	1	1
	Paraguay	1.0	0	0	0	0	0
	U.S. / Canada	11.5	1	1	1	1	1
Fresh Baby Beef	Mostly Serbia M.	22.5	1	1	1	2	4
<b>Quotas Frozen</b>	<b>Total</b>	<b>155.8</b>	<b>110</b>	<b>121</b>	<b>121</b>	<b>113</b>	<b>113</b>
Frozen GATT	Mostly Brazil	53.0	-	53	53	53	53
Frozen A	Mostly Brazil	40.0	-	40	40	40	40
Frozen B	Mostly Brazil	10.7	-	10	10	10	10
ACP*	Namibia/Botswana	52.1	-	18	18	10	10
<b>Outside Quota</b>	<b>Total</b>	<b>-</b>	<b>180</b>	<b>220</b>	<b>230</b>	<b>215</b>	<b>225</b>
<b>Fresh</b>	<b>Total</b>	<b>-</b>	<b>75</b>	<b>100</b>	<b>120</b>	<b>110</b>	<b>120</b>
	Brazil	-	50	62	70	60	60
	Argentina	-	10	22	30	20	20
	Uruguay	-	2	2	5	8	10
<b>Frozen</b>	<b>Total</b>	<b>-</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>
<b>Processed</b>	<b>Total</b>	<b>-</b>	<b>101</b>	<b>114</b>	<b>110</b>	<b>105</b>	<b>105</b>
	Brazil	-	76	84	86	85	85
	Argentina	-	19	22	16	10	10
	Uruguay	-	4	5	5	5	5
<b>Total Fresh</b>		<b>-</b>	<b>123</b>	<b>149</b>	<b>168</b>	<b>160</b>	<b>172</b>
<b>Total Frozen</b>		<b>-</b>	<b>116</b>	<b>127</b>	<b>125</b>	<b>120</b>	<b>120</b>
<b>Total Process.</b>		<b>-</b>	<b>101</b>	<b>114</b>	<b>110</b>	<b>105</b>	<b>105</b>
<b>Total Import</b>		<b>-</b>	<b>342</b>	<b>392</b>	<b>406</b>	<b>385</b>	<b>400</b>

Source: Based on figures of the European Commission and World Trade Atlas.

The following quotas are not included: Association Beef for Romania and Bulgaria (4,850 MT) and Dried Beef for Switzerland (1,200 MT). \* African, Caribbean and Pacific countries.

An increasing volume of beef is imported outside the quotas, paying the full tariff rate (see Appendix B). Imports outside the quota mainly consist of fresh beef, about 120,000 MT, and processed beef, about 105,000 MT. The main suppliers are in order of importance, Brazil, Argentina and Uruguay. The processed beef products mainly consist of corned beef, sausages and other meat products.

## II. The Benelux Beef Market

### The Benelux Beef Market In Perspective

Table III. Benelux Beef & Veal PSD 1,000 MT (Carcass Weight)						
	2002	2003	2004	2005	2006	2007
Production	700	651	677	673	666	655
Imports	264	345	338	355	355	357
Outside EU -25	78	76	100	99	82	85
Exports	472	479	495	512	495	490
Outside EU -25	40	29	27	18	18	18
Consumption*	492	517	520	516	526	522

Source: USDA / FAS

\*Consumption includes commercial stock building.

In the Benelux, about 400,000 MT of beef and about 270,000 MT of veal is produced. About 200,000 MT of veal is exported to other EU Member States. Of the 400,000 MT of beef produced in the Benelux, about half is produced from dairy cows. The other share of 200,000 MT is produced from beef cattle. Due to the limited domestic production of high quality beef, produced from beef cattle, the Benelux depends on beef imports. With a demand of 525,000 MT of beef, of which 70,000 MT is veal, the Benelux is the sixth largest beef market in the EU-25, after France, Italy, the UK, Germany and Spain. In product weight, the market size for beef and veal is estimated at about 386,000 MT.

The Benelux region offers large opportunities for third country beef suppliers to the EU. Based on its geographical location, excellent infrastructure and food processing industry, the Benelux often serves as an entry point for third country imports. In the Benelux, demand for third country beef imports is increasing, as EU production is not sufficient to supply the market. During the past year, the availability of Brazilian beef has been limited by restrictions imposed because of concerns about Foot and Mouth Disease. The supply from Argentina has been limited due to export taxes imposed by the Argentinean government. Due to the limited availability of beef on the Benelux and EU markets, domestic beef prices are increasing.

### Benelux Beef Imports

Table IV. Benelux Beef Imports 1,000 MT (Product Weight)						
	Origin	2003	2004	2005	2006*	2007*
<b>Fresh</b>	Germany	69	65	58	60	60
	Poland	1	12	21	45	60
	Ireland	25	27	33	34	35
	France	14	13	11	8	8
	Brazil	18	20	24	22	24
	Argentina	5	8	8	6	8
	Uruguay	1	1	1	1	1
	<b>Total third country</b>	<b>24</b>	<b>29</b>	<b>34</b>	<b>30</b>	<b>34</b>
	<b>Total</b>	<b>212</b>	<b>224</b>	<b>225</b>	<b>240</b>	<b>250</b>
<b>Frozen</b>	Germany	14	15	12	12	12
	France	3	3	5	5	5
	Ireland	3	8	4	4	4
	Spain	1	2	4	4	4
	Brazil	19	19	18	15	18
	Argentina	2	2	1	1	1
	Uruguay	1	1	1	2	2
	<b>Total third country</b>	<b>22</b>	<b>22</b>	<b>20</b>	<b>18</b>	<b>21</b>
	<b>Total</b>	<b>59</b>	<b>63</b>	<b>58</b>	<b>60</b>	<b>62</b>

<b>Processed</b>	Germany	5	5	4	3	3
	France	1	1	1	1	1
	Brazil	8	9	14	20	24
	Argentina	5	7	4	2	3
	<b>Total third country</b>	<b>13</b>	<b>16</b>	<b>18</b>	<b>22</b>	<b>27</b>
	<b>Total</b>	<b>26</b>	<b>30</b>	<b>31</b>	<b>32</b>	<b>32</b>
<b>Total third country</b>		<b>59</b>	<b>67</b>	<b>72</b>	<b>70</b>	<b>82</b>
<b>Total</b>		<b>297</b>	<b>317</b>	<b>314</b>	<b>332</b>	<b>344</b>

Source: World Trade Atlas

\* Forecast FAS The Hague

Besides domestic beef, German, and increasingly Polish and Irish beef dominates the Benelux fresh beef market. German and Polish beef is used for the production of a wide range of beef products. Polish beef is imported as carcasses and further cut in Dutch slaughterhouses. Irish beef is mainly channeled to retail outlets, and to a lesser extent to restaurants. Beef from English breeds, mainly produced in Ireland and Scotland, is generally fatter and tenderer than the breeds fattened on the European continent (see Table IV). Imports of Irish beef are stabilizing due to restricted supply.

Brazilian beef dominates Benelux third country imports of fresh beef. The Benelux market is, in general, a price market. Due to its competitive price, Brazilian beef is preferred above beef from Argentina and Uruguay. On the basis of quality, Argentinean beef (predominantly Angus beef) is preferred over Brazilian beef (mainly cross breeds) because of tenderness. Argentinean exports are focused on high value cuts such as the tenderloin, strip loin and rib eye, but will also include inside round, silverside and knuckle to fill the import quota. Brazilian exports are focused on the tenderloin, strip loin, rib eye and rump. Due to the restricted supply from Brazil and Argentina, importers increasingly source their beef from Uruguay. Some importers choose Uruguayan beef because of the pure Hereford basis of many herds in that country.

U.S. beef exports to the Benelux total almost 500 MT per year. Not all imported U.S. beef is consumed within this market. FAS/The Hague estimates that roughly a third is exported to other EU markets like Germany, the UK and Italy. The vast majority of beef imported from the U.S. is Prime grade quality, thus marbled with a higher fat content. Roughly a quarter of all cuts are the high value cuts (tenderloin, strip loin and rib eye). They are sold to local wholesalers that supply the high-end restaurants. The remaining 75 percent, including the lower value cuts (flank steak, chuck eye roll, briskets, etc.), compete more directly with cuts from Europe and South America on the basis of price. FAS/The Hague values the U.S. beef market in the Benelux (wholesale prices) at Euro 6.5 million of which over Euro 2 million is sold to customers in other EU member states. The high value cuts account for roughly half (120,000 kg x Euro 27 = Euro 3.2 million) of the value, and the lower value cuts account for the other half (360,000 kg x Euro 9 = Euro 3.2 million).

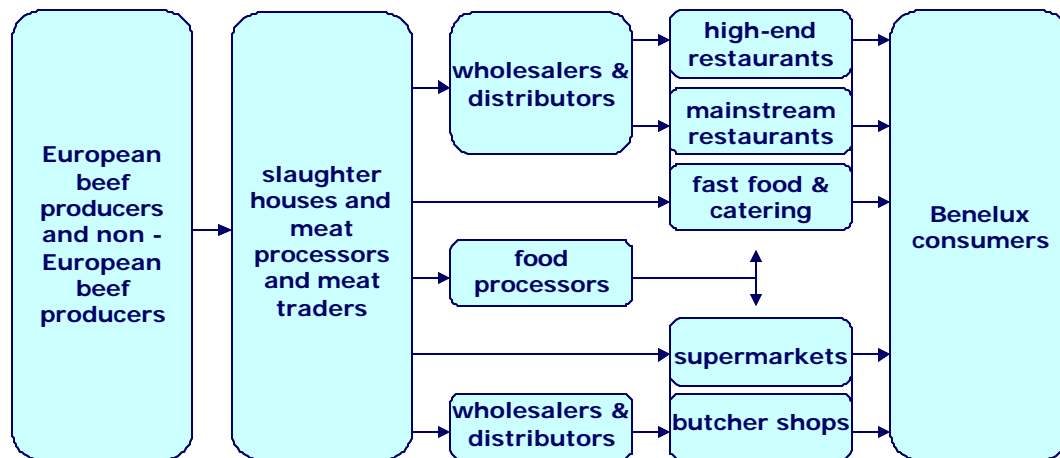
<b>Table V. Importer prices, Euro per kg</b>				
<b>Origin</b>		<b>Tenderloin</b>	<b>Rib eye</b>	<b>Strip loin</b>
USA	- Wagyu	70	65-68	54-57*
	- Black Angus	36	30	26
Australia	- Wagyu	78*	61*	52*
	- Black Angus	24-27	13-14	14*
Ireland		22-25	11-13	13*
UK		22-25	11-13*	13*
New Zealand		19-21	12	12.50*
Argentina		14-17	10	12*
Uruguay		14-17	9	11*
Benelux		14-15	7-9	11*
Brazil		13-15	8	11*

Source: Based on meetings with importers

\* FAS/The Hague estimates

### III. Segmentation of the Benelux Beef Market

The diagram below depicts the Benelux beef market, showing the segmentation between the food service and retail sectors and the further division between restaurants, fast food and catering on one hand, and supermarkets and butcher shops on the other.



#### Benelux Consumers

The Benelux has a population of 27 million. The main characteristics of this population are the following:

- Population is stable and ageing.
- Declining size of average household. This development drives the demand for portioned and packed meat products.
- Growing ethnic population, and thus increasing demand for niche products such as organic, halal and kosher.
- Greater consumer concern and awareness of obesity and healthy diets. This drives the demand for low fat meat products. It should be mentioned that traditionally, Dutch consumers prefer lean beef.
- Compared to French, Italian and Spanish consumers, Dutch and to a lesser extent Belgian consumers, are more price sensitive regarding their expenditure on food.

Meat, including poultry, still dominates the center of the plate, although seafood is catching up. More competition is also expected in the coming years from meat replacers (vegetarian meal components). Total demand for meat and meat products is stable, however, consumers are shifting preferences within their meat diet. Poultry and further processed meat products are gaining market share at the expense of pork and beef. Finally, consumers view beef as healthy and having a good taste.

### Segmentation of the Benelux Beef Market

#### The Foodservice Market

The turnover of the Benelux foodservice industry is over Euro 16 billion. Restaurants, fast food and catering together account for over 90 percent of this industry. The foodservice sector accounts for about thirty percent of the beef market in the Benelux and it is anticipated to grow further. The fast food and catering sector are highly consolidated with a

handful of dominant players. The other main foodservice sub-sector, restaurants, is highly fragmented. Generally, they are independent family-run companies. Wholesalers and meat distributors generally are responsible for supplying the majority of the restaurants. Beef cuts typically supplied by wholesalers and distributors to mainstream restaurants are outlined in Table VI.

In order to calculate menu prices, mainstream restaurants generally multiply their purchase prices by a factor of 3 to 4. High-end restaurants apply the same formula but often use a higher factor, 4 to 5. As a result, a purchase price difference of Euro 5 can result in a menu price difference of Euro 15 to Euro 25.

### **High-end Restaurants**

High-end restaurants make up only a few percent of the Benelux beef market. In this restaurant segment, the focus is rather on superb quality and variety than on price and volume. It is this part of the market where U.S. beef is found the menu. U.S. beef has received excellent reviews in the Benelux media during PR and promotional events. Although its excellent quality is undisputable, the price often remains a constraint. On a limited scale, some restaurants are working with medium value U.S. cuts, like the shoulder clods and flank steaks, as a result of information gained at training events and seminars.

Australia is a supplier of high quality, grain-fed beef to this market segment at lower prices than current U.S. imports. Other suppliers include Ireland, Scotland and Argentina, which also offer high quality and leaner beef at competitive prices. Besides price, these competitors have another advantage in the ability to provide a stable supply of products. Traders have indicated that on an annual basis, U.S. beef suppliers are still struggling to supply the same quantities every month. As a result, traders and subsequently wholesalers/distributors are not always in the position to deliver. Restaurant buyers need to rely on the stable availability of U.S. beef when it's on their menu.

<b>Table VI. Wholesale prices of High-end beef, Euro per kg</b>				
<b>Origin</b>		<b>Tenderloin</b>	<b>Rib eye</b>	<b>Strip loin</b>
USA	- Wagyu	92*	89*	72*
	- Black Angus	47.50	37	31.50
Australia	- Wagyu	99	81	74
	- Black Angus	30	20	18.50
Ireland		34	16	17.25
UK		34*	16*	17.25*
New Zealand		27.50	19	16.75
Argentina		25	15	16
Uruguay		24	14	15
Benelux		21	12	15
Brazil		24	14	15

Source: Based on meetings with High-end Wholesalers

\* FAS/The Hague estimates

Finally, U.S. beef exporters are still selling the whole carcass as a full set to Benelux importers. As a result, importers need to find alternative markets for the lower value cuts that are not yet being used by most of the restaurants. Competitive third country suppliers have been better in meeting importer demand and are selling individual cuts.

### **Mainstream Restaurants**

Mainstream restaurants account for about thirteen percent of the Benelux beef market. This segment of the foodservice sector often consists of buyers of average and high quality beef while the main focus is maximizing profit margins. They buy their beef via meat distributors or at wholesalers (see Table VII). In this market segment, beef from Brazil and Europe is popular.



Table VII. Wholesale prices of Mainstream beef, Euro per kg		
Product	Country of Origin	Price
Tenderloin	Ireland	40
Tenderloin	The Netherlands	30 – 37
Strip loin	Ireland	25
Tenderloin	Brazil	22 – 30
Rib eye	Ireland	20
T-bone	The Netherlands	18
Strip loin	The Netherlands	16 – 20
Rib eye	Brazil	15 – 23
Strip loin	Brazil	15 – 17
Rump	Brazil	15
T-bone	Brazil	15
Top inside round	The Netherlands	15
Steak	Brazil	14
Steak	The Netherlands	13
Top inside round	Brazil	12
Rib steak	The Netherlands	7 – 9

Source: Based on visits to wholesalers and contacts with meat delivery companies

### ***Fast Food and Catering***

This market accounts for roughly half of total foodservice sales. Beef sales via the fast food and catering channel accounts for an estimated fifteen percent of total beef sales. The fast food and catering industry mainly demand lower quality and/or price competitive beef and therefore mainly sources beef from Brazil, both fresh and frozen, and Europe. Brazil has been able to meet their clients' needs by shipping more tailor-made products and adapting quickly to EU import requirements. In addition, Brazil is planning to build a new distribution center in Rotterdam to better meet the demand from their European clients.

### **The Food Retail Market**

The Benelux food retail industry has a total turnover of Euro 43 billion and is dominated by full service supermarkets. About seventy percent of total beef volume is sold via the food retail channel.

### ***Supermarkets***

Supermarkets are responsible for eighty percent of these sales, about 215,000 MT. It is anticipated that this volume will expand at the expense of beef sales by butcher shops. Supermarkets increasingly offer more high value meat and a greater variety of meat products in their assortment. As a result, traditional butcher shops are struggling to survive in their competition with supermarkets. In some supermarket formulas, although still on a limited scale, this high quality meat is displayed at a counter, in practice similar to a traditional butcher shop.

European beef still dominates the supermarket shelves. It is important to mention that Benelux retail customers have a strong preference for buying lean beef, which, in general, is grass-fed beef. European and South American countries produce grass-fed beef and are therefore popular suppliers for Benelux retailers. The leading suppliers include Ireland and Germany. Retail products like rib eye and round steak come from Ireland and Scotland whereas regular and organic steaks often originate from Germany. Increasingly, but still on a limited scale, non-European beef is sold in supermarkets. The best examples of this are cuts like rib eye, strip loin and rump steak from Argentina and Uruguay. The beef is in most cases sealed and nicely packed. Sometimes it is cut at the counter. The price of these high value cuts is set at the same price level as cuts of comparable quality of European origin (see Table VIII).

Table VIII. Supermarket prices, Euro per kg		
Product	Country of Origin	Price
Tenderloin (a)	Argentina/Uruguay	37
Tenderloin (Greenfield*) (b)	Ireland	37
Steak, organic (b)	Germany	22
Sir loin steak (a) (c)	Argentina/Uruguay	20
Rib eye steak (a) (c)	Argentina/Uruguay	20
Rump steak (a) (c)	Argentina/Uruguay	20
Rib eye (Greenfield*) (b)	Ireland	20
Strip loin (Greenfield*) (b)	Ireland	20
Steak (Greenfield*) (b)	Ireland	18
Steak (a)	Argentina/Uruguay	18
Pepper steak (Greenfield*) (b)	Ireland	16
Top inside round (b)	The Netherlands	15
Steak (b)	Germany	13
Rib steak (b)	The Netherlands	7 – 10

Source: Based on visits to retailers

(a) Cut at a counter. (b) Packed, self-service. (c) Hermetically sealed and packed. \* Brand name for Irish beef.

### **Butcher Shops and Delicatessen Stores**

Traditional butcher shops and delicatessen stores still account for approximately twenty percent of total beef sales via retail, about 55,000 MT. Sales of beef products through other retail channels (such as department stores) are very small. Butcher shops once dominated beef sales within retail. Now, because of the increasing quality and variety of beef products in supermarkets, they are trying to differentiate themselves. Some have moved into the catering area whereas others are trying to attract a new audience by offering higher quality and niche meat products. The prices are generally higher than in the supermarket (see Table IX). Butchers generally use a margin of 100 percent on the wholesale price. Consumers who go to a butcher shop for their meat purchases generally are willing to spend more money compared to buying meat at supermarkets.

Table IX. Butcher shop prices, Euro per kg		
Product	Country of Origin	Price
Tenderloin	The Netherlands	53
Tenderloin	Ireland	40 – 50
Tenderloin	Argentina	30 – 40
Top inside round steak	The Netherlands	30
Rib eye	Ireland	29
Strip loin	The Netherlands	28
Strip loin	Scotland	27
Top sirloin Culotte	The Netherlands	27
Eye round	The Netherlands	26
Rib eye	Argentina	19
Steak	The Netherlands	18 – 21
Rib steak	Ireland	12 – 14

Source: Based on visits to butcher shops

Butcher shops predominantly sell beef produced in the EU. Most butchers judge European beef, particularly Irish beef, as higher quality than South American beef, even Argentinean. Some butchers regard Irish beef as too fat and prefer Dutch, Belgian and French beef. Butchers have the opinion that the majority of Dutch customers prefer lean, but tender beef. A handful of high-end butcher shops in the Benelux have recently start selling U.S. beef.

## IV. Conclusions and Recommendations

FAS/The Hague believes U.S. beef could further penetrate the Benelux market from the current volume of 300 MT to an estimated 3,400 MT yearly. While this projection is a rough approximation, it is provided as a reasonable target for U.S. beef suppliers. The projected level of 3,400 MT of import demand for US beef is only one percent of the Benelux beef market. Considering the price sensitivity of the Benelux consumer, it may be that the markets in some other EU member state would show an even greater response to improved access to US beef.

Related reports from FAS Post in the European Union:

Country	Title	Date	Report Number
EU-27	Livestock and Products Semi-Annual	1/29/2007	E47008
EU-25	Livestock and Products Annual	7/14/2006	E36107
EU-25	U.S. beef faces strong competition on the European market.	9/8/2005	E35178

The GAIN Reports can be downloaded from the following FAS website:

<http://www.fas.usda.gov/scripts/attacherep/default.asp>

## Appendixes

Appendix A Inside Quota Import Tariffs				
	Origin	Quota (1,000 MT)	Ad Valorem Duty (%)	Fixed Duty (€/MT)
<b>Fresh Hilton</b>		<b>59.1</b>	<b>20</b>	-
Fresh Baby Beef		22.5	20	A
Frozen Beef GATT		53.0	20	-
Frozen A		40.0	20	B
Frozen B		10.7	20	B
ACP		52.1	-	C

(a) Lifting 80 percent of the fixed duty. (b) Fixed duty ranges between Euro 994.5 – 2,138.4 per Mt depending on the product. (c) Lifting 92 percent of the fixed duty.

\*Duty difference for fresh beef in and outside quota, see excel file.

Appendix B Outside Quota Import Tariffs				
	Origin	Quota (1,000 MT)	Ad Valorem Duty (%)	Fixed Duty (€/MT)
Fresh	Carcasses	-	12.8	1,768
	Compensated quarters	-	12.8	1,768
	Forequarters	-	12.8	1,414
	Hindquarters	-	12.8	2,122
	Other, with bone	-	12.8	2,652
	<b>Without bone</b>	-	<b>12.8</b>	<b>3,034</b>
Frozen	Carcasses	-	12.8	1,768
	Compensated quarters	-	12.8	1,768
	Forequarters	-	12.8	1,414
	Hindquarters	-	12.8	2,122
	Other, with bone	-	12.8	2,652
	Without bone			
	-Compensated quarters	-	12.8	2,211
	-Crops, chucks, blades, briskets	-	12.8	2,211
	-Other	-	12.8	3,041
Processed	Not canned	-	-	3,034
	Canned	-	16.6	-

(a) Lifting 80 percent of the fixed duty. (b) Fixed duty ranges between Euro 994.5 – 2,138.4 per Mt depending on the product. (c) Lifting 92 percent of the fixed duty.